

Message Text

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R 211445Z APR 78
FM AMEMBASSY BELGRADE
TO SECSTATE WASHC 6359
USDOC WASHDC

UNCLAS SECTION 1 OF 6 BELGRADE 3175

E.O. 11652: N/A
TAGS: BEXP, AFSP, YO
SUBJECT: FY 1979 COUNTRY COMMERCIAL PROGRAM

REF: A) STATE 87863, B) STATE 39674, C) STATE 118 (NOTAL)

FOLLOWING IS REQUESTED DETAILED DRAFT OF FY 1979 CCP FOR
YUGOSLAVIA:

SECTION I - OVERVIEW

THE EMPHASIS WAS ON GROWTH IN THE YUGOSLAV ECONOMY IN 1977. INDUSTRIAL PRODUCTION INCREASED BY 9.4 PERCENT, EMPLOYMENT WAS UP 4 TO 5 PERCENT, GROSS SOCIAL PRODUCT SHOWED A REAL INCREASE OF 7 TO 8 PERCENT, AND REAL INVESTMENT INCREASED BY 9 TO 12 PERCENT. THE CURRENT ACCOUNT RECORDED THE BIGGEST DEFICIT IN HISTORY, HOWEVER, THANKS TO A 4.3 BILLION DOLLAR TRADE DEFICIT AND STAGNATING INVISIBLE EARNINGS. THE ESTIMATED 1.7 BILLION DOLLAR CURRENT ACCOUNT DEFICIT WAS ENTIRELY COVERED BY INCREASED FOREIGN BORROWING AS HARD CURRENCY RESERVES MAINTAINED THE RECORD LEVELS OF LATE 1976. THE COST OF LIVING INCREASED BY ONLY 14.1 PERCENT, THANKS TO STRINGENT PRICE CONTROLS AND A SUCCESSFUL HARVEST.

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ACCORDING TO U.S. FIGURES BILATERAL TRADE AMOUNTED TO 691.4 MILLION DOLLARS IN 1977. WHICH THIS IS ONLY A SLIGHT INCREASE OVER 1976 (678.8 MILLION DOLLARS), IT STILL REPRESENTS AN ALL-TIME HIGH. FURTHERMORE, THE MARGINAL INCREASE IN TRADE WAS DUE TO A DECLINE IN YUGOSLAV EXPORTS (FROM 383.1 MILLION DOLLARS IN 1976 TO 336.0 MILLION DOLLARS IN 1977) RATHER

THAN A DECREASE IN U.S. EXPORTS. U.S. EXPORTS IN 1977 WERE 355 MILLION DOLLARS (295.4 MILLION DOLLARS IN 1976).

WHILE THE U.S. RANKS THIRD IN NUMBER OF FOREIGN JOINT VENTURES, IN TERMS OF TOTAL FUNDS INVESTED U.S./YUGOSLAV JOINT VENTURES ARE FIRST. POSSIBILITIES FOR INCREASED U.S. INVESTMENT ARE EXCELLENT. U.S. FIRMS REMAIN VERY INTERESTED IN JOINT VENTURE POSSIBILITIES AND THE RECENT PASSAGE OF NEW, GENERALLY MORE FAVORABLE, JOINT VENTURE LEGISLATION SHOULD SPUR FURTHER INTEREST.

THE OUTLOOK FOR U.S./YUGOSLAV TRADE IN 1978-79 IS FAVORABLE. THE 1976-1980 MEDIUM TERM DEVELOPMENT PLAN EMPHASIZES INVESTMENT IN SEVERAL SECTORS WHERE U.S. FIRMS SHOULD BE VERY COMPETITIVE - ESPECIALLY SINCE THE DECLINE OF THE DOLLAR. NEW, LESS RESTRICTIVE, REGULATIONS PERMITTING THE OPENING OF FOREIGN REPRESENTATION OFFICES IN YUGOSLAVIA AND A GREATER REALIZATION ON THE PART OF YUGOSLAVS OF THE NECESSITY OF EXPORTING AND OF COMPETING IN NEW MARKETS (E.G. U.S.) SHOULD INCREASE TRADE.

TO COMPETE EFFECTIVELY U.S. FIRMS MUST MAINTAIN A LONG-TERM INTEREST IN YUGOSLAVIA, BE FAMILIAR WITH THE MARKET; UP TO DATE ON THE MANY ECONOMIC CHANGES NOW BEING INSTITUTED; AND FLEXIBLE AND IMAGINATIVE IN NEGOTIATING BUSINESS DEALS.

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THE UNITED STATES IS READY TO COOPERATE IN YUGOSLAV ECONOMIC DEVELOPMENT AND INTENDS TO STRENGTHEN BILATERAL TRADE RELATIONS. OUR DIRECT ECONOMIC AND COMMERCIAL OBJECTIVES ARE:

- TO PROMOTE THE EXPORT OF U.S. PRODUCTS AND TECHNOLOGY TO YUGOSLAVIA, WHILE RECOGNIZING THE YUGOSLAV NEED TO INCREASE SALES TO THE U.S.;

-- TO FACILITATE U.S. INVESTMENT EFFORTS IN YUGOSLAVIA AS SUPPORTED, WHEN PERMITTED, BY OPIC; DEVELOP U.S. UNDERSTANDING OF THE INVESTMENT CLIMATE AND SEEK ITS IMPROVEMENT;
--TO ENCOURAGE RESTRAINTS AS HER BALANCE OF PAYMENTS PERMITS;
--TO ENCOURAGE THE YUGOSLAVS TO BE MORE FORTHCOMING WITH REGARD TO COMMERCIAL INFORMATION, SUCH AS DATA ON YUGOSLAV ENTERPRISES AND JOINT VENTURES AND DETAILS ON CURRENT IMPORT RESTRICTIONS, COUNTER TRADE REQUIREMENTS AND OTHER TRADE RELATED REGULATIONS;
--TO BUILD ON OUR EFFORTS TO ACHIEVE AN EXPEDITIOUS, CONSISTENT AND RELIABLE EXPORT CONTROL SYSTEM FOR HIGH TECHNOLOGY ITEMS;
--TO SEEK PROMPT RESOLUTION OF ANY BILATERAL TRADE QUESTIONS THAT MAY ARISE CONCERNING SUCH MATTERS AS GENERALIZED PREFERENCES, TRADEMARKS AND FOOD AND DRUG LAWS;

--TO SUPPORT ABOVE OBJECTIVES WITH ANALYSIS OF YUGOSLAVIA'S
FOREIGN TRADE RELATIONS AND ECONOMIC TRENDS , PARTICULARLY
THE CURRENT IMPLEMENTATION OF "SELF MANAGEMENT" CONCEPTS TO
NEW AREAS OF THE ECONOMY;
--TO OFFER TO ENGAGE IN MEANINGFUL DIALOGUE ON MULTILATERAL
ECONOMIC QUESTIONS ON WHICH YUGOSLAVIA CAN PLAY A CONSTRUCTIVE
ROLE AMONG THE NON-ALIGNED AND DEVELOPING COUNTRIES.

TRADE PROMOTION ACTIVITIES WILL EMPHASIZE GREATER U.S.
EXPORTS OF EQUIPMENT AND TECHNOLOGY FOR THE METAL PROCESSING
AND MINING INDUSTRIES. EFFORTS WILL ALSO BE MADE TO UNCOVER
NEW TRADE OPPORTUNITIES AND TO ENCOURAGE U.S. FIRMS TO
COMPLETE AGGRESSIVELY ON THESE AND OTHER MAJOR PRODUCT AND PROJECT
OPPORTUNITIES.
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R 211445Z APR 78
FM AMEMBASSY BELGRADE
TO SECSTATE WASHDC 6360
USDOC WASHDC

UNCLAS SECTION 2 OF 6 BELGRADE 3175

CAMPAIGN NUMBER 1 PRIORITY RANK 2

CAMPAIGN TITLE: METAL PROCESSING EQUIPMENT (INCLUDING METAL
WORKING EQUIPMENT AND MACHINE TOOLS)

CAMPAIGN MANAGERS: C.HILL AND W. POPE

DESCRIPTION/JUSTIFICATION: DURING THE PERIOD 1976-80, YUGOSLAVIA IS COMMITTED TO INCREASING ITS ANNUAL PRODUCTION OF IRON FROM 3.0 MILLION TO 4.3 MILLION TONS, AND OF BASIC STEEL FROM 4.6 MILLION TO 6.3 MILLION TONDS. ANNUAL IMPORTS OF PRIMARY METALS PROCESSING EQUIPMENT ARE EXPECTED TO REACH ABOUT 200 MILLION DOLLARS IN 1980; ANNUAL IMPORTS OF MACHINE TOOLS SHOULD GROW TO APPROXIMATELY 150 MILLION DOLLARS. WHILE GREATER PARTICIPATION OF DOMESTIC EQUIPMENT MANUFACTURERS IN LARGE PROJECTS IS ONE OF THE GOVERNMENT'S MAIN ECONOMIC GOALS, IN THE AREA OF PRIMARY METAL PROCESSING EQUIPMENT LOCAL FIRMS FREQUENTLY LACK THE KNOW-HOW AND PRODUCTION CAPACITY TO COMPLETE WITH FOREIGN SUPPLIERS. IN THE FIELD OF METALWORKING MACHINERY, DOMESTIC MANUFACTURERS ARE WELL ADVANCED AND HAVE A QUALIFIED WORKFORCE BUT, DUE TO THE LIMITS IMPOSED BY THE SMALL SIZE OF THE DOMESTIC MARKET, DO NOT HAVE THE INCENTIVE TO

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DEVELOP HIGHLY SOPHISTICATED AND PRODUCTIVE MACHINE TOOLS (E.G. LARGE PRESSES, TRANSFER LINES, MACHINING CENTERS, ETC.) CONSEQUENTLY FOREIGN FIRMS ARE PERMITTED TO COMPETE WITH DOMESTIC ENTERPRISES IN MANY CATEGORIES OF EQUIPMENT. U.S. FIRMS WILL FACE STRONG COMPETITION FROM WEST EUROPEAN SUPPLIERS, MANY OF WHICH ARE ALREADY WELL ESTABLISHED IN THE MARKET. HOWEVER, THE REPUTATION OF U.S. FIRMS FOR QUALITY AND SUPERIOR TECHNOLOGY AS WELL AS POSSIBLY LOWER PRICES RESULTING FROM THE RECENT DECLINE IN THE VALUE OF THE DOLLAR WILL OFFER SIGNIFICANT COMPETITIVE ADVANTAGES. THIS CAMPAIGN IS AIMED AT HELPING U.S. SUPPLIERS TO OVERCOME THE TRADITIONAL YUGOSLAV ORIENTATION TOWARD WESTERN EUROPE AND TO THEREBY EXPAND THEIR MARKET SHARE.

CAMPAIGN ACTION: CUMULATIVE MILESTONES

DEC. MAR. JUNE SEPT

1. PROMOTE AND SUPPORT TECHNICAL
SALES SEMINAR ON WELDING IN NOV 1978 X

2. PROMOTE AND SUPPORT TECHNICAL
SALES SEMINAR ON METALLURGICAL
PROCESSING IN APRIL 1979 X X

3. PROMOTE AND SUPPORT NMTBA
SPONSORED TECHNICAL SEMINAR ON
MACHINE TOOLS IN MAY 1979
(ALTERNATIVELY MARCH 1979) X X

4. FOLLOW UP ON CONTACTS MADE DURING
SEMINARS TO OBTAIN EARLY WARNING

ON MAJOR PRODUCT AND PROJECT

OPPORTUNITIES X X X X

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CAMPAIGN NUMBER 2 PRIORITY RANK: 3

CAMPAIGN TITLE: TECHNOLOGY AND EQUIPMENT FOR THE MINING
INDUSTRY CAMPAIGN MANAGER: C. HILL

DESCRIPTION/JUSTIFICATION: IN ORDER TO PROVIDE MORE DOMESTIC
RAW MATERIALS FOR YUGOSLAV INDUSTRY, THE EXTRACTION OF MINERALS
HAS BEEN DESIGNATED A PRIORITY DEVELOPMENT AREA IN THE CURRENT
FIVE-YEAR PLAN AND IS EXPECTED TO RECEIVE A SIMILAR DESIGNATION
IN THE PLAN FOR 1981-1985. ONE OF THE REASONS FOR THIS IS TO
DECREASE THE COUNTRY'S HEAVY DEPENDENCE ON IMPORTED RAW
MATERIALS AND THEREBY IMPROVE ITS BALANCE OF PAYMENTS POSITION.
THE FIVE-YEAR PLAN IS BEING IMPLEMENTED THROUGH A SERIES OF
AGREEMENTS BETWEEN PRODUCERS AND END-USERS IN SELECTED INDUSTRIES.
UNDER THE AGREEMENTS ON MINERALS EXTRACTION AND PROCESSING,
600 MILLION DOLLARS HAS BEEN EARMARKED FOR INVESTMENT IN COAL
MINING, 1.2 BILLION DOLLARS FOR DEVELOPMENT OF FERROUS
METALLURGY AND 1.4 BILLION DOLLARS FOR DEVELOPMENT OF
NONFERROUS METALLURGY. A GOOD PORTION OF THOSE INVESTMENTS
WILL BE SPENT ON EXPANSION OF EXISTING MINES AND OPENING OF
NEW ONES. ALSO THE NEW JV LAW PERMITS INVESTMENT IN BOTH
PROSPECTING AND EXTRACTING ACTIVITIES. THE MARKET FOR IMPORTED
MINING EQUIPMENT IS EXPECTED TO REACH ABOUT 60 TO 70
MILLION DOLLARS ANNUALLY BY 1980. THE VALUE OF IMPORTED
TECHNOLOGY FOR THE MINING INDUSTRY IS ESTIMATED TO BE EQUAL
TO OR GREATER THAN THE VALUE OF EQUIPMENT IMPORTS.
CAMPAIGN ACTIONS ARE GEARED TO HELPING U.S. EQUIPMENT SUPPLIERS
SUBSTANTIALLY INCREASE THEIR SHARE OF THE MARKET WHICH PRESENTLY
STANDS AT ONLY 2 PERCENT, BY BRINGING KEY INDUSTRY DECISIONMAKERS
INTO CONTACT WITH LATEST U.S. MINING TECHNOLOGY AND BY
EXPEDITIOUSLY IMPORTING NEW TRADE AND INVESTMENT OPPORTUNITIES.

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R 211445Z APR 78
FM AMEMBASSY BELGRADE
TO SECSTATE WASHDC 6361
USDOC WASHDC

UNCLAS SECTION 3 OF 6 BELGRADE 3175

CAMPAIGN ACTION	CUMULATIVE MILESTONES			
	DEC	MAR	JUNE	SEPT

1. DEVELOP LIST OF KEY CONTACTS IN THE MINING INDUSTRY, GOVERNMENT AND DOMESTIC EQUIPMENT MANUFACTURERS. SUPPORT A TRADE MISSION OF MINING EQUIPMENT MANUFACTURERS IN NOV 1978.				X
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2. MONITOR RESULTS OF THE TRADE MISSION BY MAINTAINING FOLLOW-UP CONTACTS.	X	X	X	
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3. REPORT MAJOR MINING PROJECTS AS PLANS ARE MADE PUBLIC.	X	X	X	X
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4. MAKE PERIODIC VISITS TO MAJOR MINING ENTERPRISES TO ESTABLISH CONTACTS IN INDUSTRY AND OBTAIN EARLY WARNING ON MAJOR PROJECT AND PRODUCT OPPORTUNITIES.	X	X	X	X
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CAMPAIGN NUMBER 3	PRIORITY 4
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CAMPAIGN TITLE: MAJOR PROJECTS/ PRODUCT OPPORTUNITIES

CAMPAIGN MANAGER: R.B. MCMULLEN/R. CHRISTENSEN

DESCRIPTION/JUSTIFICATION: UNDER YUGOSLAVIA'S FIVE-YEAR ECONOMIC PLAN (1976-1980), MAJOR INVESTMENTS ARE TARGETED FOR THE DEVELOPMENT OF ENERGY SYTEMS, RAW MATERIALS PRODUCTION, LARGE SCALE INDUSTRIAL PROCESSING, EQUIPMENT MANUFACTURING AS WELL AS CONSUMER PRODUCTS INDUSTRIES. TO A SIGNIFICANT EXTENT, U.S. EXPORT POTENTIAL DEPENDS O THE ABILITY OF U.S. FIRMS TO EXPLOIT MAJOR PROJECT AND PRODUCT OPPORTUNITIES IN THESE FIELDS. U.S FIRMS HAVE PARTICULARLY GOOD PROPECTS

IN PROJECTS IN MINING AND MINERALS PROCESSING, ELECTRICAL POWER GENERATION, PETROLEUM AND NATURAL GAS EXPLORATION AND EXTRACTION, CHEMICAL PROCESSING, FOOD PROCESSING, AND ELECTRONIC AND COMPUTER SYSTEMS. SALES OPPORTUNITIES INCLUDE TECHNOLOGY AND ENGINEERING SERVICES AS WELL AS EQUIPMENT. WITH THE INCREASE IN ACTIVITY OF YUGOSLAV ENGINEERING AND CONSTRUCTION ENTERPRISES ABROAD, ESPECIALLY IN DEVELOPING COUNTRIES, THERE ARE ALSO GOOD POSSIBILITIES FOR SALES IN THIRD-COUNTRY MARKETS EITHER ON A SUBCONTRACTING OR JOINT VENTURE BASIS. AS AN ADDITIONAL CAMPAIGN ACTIVITY AIMED AT CONTRIBUTING TO TWO OF USDOC'S SPECIAL WORLDWIDE TRADE PROMOTION PROGRAMS, THE POST WILL MAKE GREATER EFFORTS TO SEEK OUT EXPORT OPPORTUNITIES FOR U.S. FOOTWEAR MANUFACTURERS AND OTHER U.S. COMPANIES WHICH ARE MINORITY OWNED AND/OR OF SMALL-TO-MEDIUM SIZE.

CAMPAIGN ACTION	CUMULATIVE MILESTONES			
	DEC	MAR	JUN	SEPT

1. ESTABLISH AND CULTIVATE CONTACTS
WITH PERSONS AND OFFICES RESPON-
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SIBLE FOR ECONOMIC AND INDUSTRIAL
DEVELOPMENT PROGRAMS AND SPECIFIC
PROJECTS. UTILIZE THESE CONTACTS
TO OBTAIN INFORMATION AT THE EARLIEST
STAGES OF PROJECT CONCEP-
TUALIZATION AND PLANNING OR WITH
RESPECT TO PENDING DECISIONS
RELATED TO MAJOR PROJECT/PRODUCT
PURCHASES. X X X X

2. ARRANGE TO OBTAIN NOTICE OF
PRE-QUALIFICATION REQUIREMENTS.
REQUESTS FOR CONSULTING/
ENGINEERING/CONSTRUCTION PROPOSALS,
AND EQUIPMENT BID INVITATIONS X X X X

3. REPORT EXPEDITIOUSLY INFORMATION
OBTAINED, OF A PROJECT OR
PROSPECTIVE PRODUCT SALE TO PERMIT
EARLY WARNING TO POTENTIALLY INTERESTED U.S.
FIRMS. X X X X

4. MEET WITH U.S. BUSINESSMEN,
EVALUATE AND RECOMMEND STRATEGY AND
ACTIONS APPROPRIATE FOR U.S.
FIRMS TO EXPLOIT MAJOR PROJECT/
PRODUCT LEADS, PARTICULARLY WITH

RESPECT TO MEETING FOREIGN

COMPETITION X X X X

5. REMAIN ALERT TO ANNOUNCEMENTS OR
REPORTS ON CONTRACTS WON BY YUGOSLAV CONSULTING,
ENGINEERING AND CONSTRUCTION
COMPANIES IN THIRD COUNTRIES.
MAKE CONTACT WITH CONTRACT WINNERS
AND/OR OTHER AVAILABLE SOURCES TO
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ASCERTAIN POSSIBILITIES FOR U.S.
SUPPLIERS. IF OUTLOOK IS
ENCOURAGING, PREPARE AND SUBMIT
REPORTS REFLECTING SALES
OPPORTUNITIES FOR U.S. SUPPLIERS TO
CONTRACT WINNERS. X X X X

6. PLACE SPECIAL EMPHASIS ON LOCATING
AND FOLLOWING UP ON TRADE
OPPORTUNITIES FOR U.S. FOOTWEAR
MANUFACTURERS IN YUGOSLAV MARKET. X X X X

7. RESPOND QUICKLY TO USDOC-INITIATED
TEMPS (NEW TAILORED EXPORT MARKET-
ING PLANS SERVICE) REQUESTS. X X X X

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R 211445Z APR 78
FM AMEMBASSY BELGRADE
TO SECSTATE WASHDC 6362

USDOC WASHDC

UNCLAS SECTION 4 OF 6 BELGRADE 3175

CAMPAIGN NUMBER 4 PRIORITY RANK 5

CAMPAIGN TITLE: REPUBLIC ECONOMIC/COMMERCIAL VISIT PROGRAM

CAMPAIGN MANAGER: DAVID EVANS

DESCRIPTION/JUSTIFICATION: IN ORDER TO MORE EFFECTIVELY ENCOURAGE BILATERAL TRADE AND INVESTMENT IN YUGOSLAVIA AMBASSADOR EAGLEBURGER IN MARCH 1977 INITIATED A REPUBLIC VISIT PROGRAM UNDER WHICH EMBASSY E/C PERSONNEL WOULD ON A PERIODIC BASIS VISIT ALL OF YUGOSLAVIA EIGHT REPUBLICS AND AUTONOMOUS REGIONS. INFORMATION ON NEW TRADE AND INVESTMENT OPPORTUNITIES IS DISTRIBUTED TO U.S. FIRMS THROUGH USDOC, THE USYEC, TRADE ASSOCIATIONS, BUSINESS PERIODICALS AND FOREIGN TRADE OFFICES OF U.S. STATES. THE VISIT PROGRAM SHOULD CONTINUE TO RECEIVE A HIGH PRIORITY IN FY 1979 GIVEN THE INCREASED DECENTRALIZATION OF THE YUGOSLAV ECONOMY MOST CLEARLY MANIFESTED IN THE LARGE RESPONSIBILITIES IN TRADE MATTERS WHICH INDIVIDUAL REPUBLICS AND REGIONS NOW HAVE ACQUIRED.

THE OBJECTIVE OF THE CAMPAIGN WILL BE TO UNCOVER NEW OPPORTUNITIES FOR BILATERAL TRADE AND INVESTMENT, WITH AS MANY SPECIFICS AS POSSIBLE, AND TO THEREBY ASSIST IN
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MAXIMIZING THE OVERALL STRENGTHENING OF BILATERAL ECONOMIC RELATIONS.

CAMPAIGN ACTIONS CUMULATIVE MILESTONES

DEC MAR JUNE SEPT

THE EMBASSY WILL THE ASSISTANCE
OF CONGEN ZAGREB AND USDOC WILL:

1. ENSURE THAT FOUR REPUBLICS AND
AUTONOMOUS REGIONS ARE VISITED
EACH QUARTER THUS PERMITTING TWO
VISITS ANNUALLY TO EACH GEOGRAPHIC AREA X X X X

2. PREPARE AND EFFECTIVELY DISSEMINATE
TRADE AND INVESTMENT LEADS THROUGH
USDOC, USYEC, TRADE ASSOCIATIONS
BUSINESS PERIODICALS AND FOREIGN TRADE
OFFICES OF U.S. STATES X X X X

3. ON FOLLOW-UP TRIPS PROVIDE DETAILED
INFORMATION TO YUGOSLAV OFFICIALS
ON WHAT ACTIONS THE EMBASSY HAS
TAKEN SINCE THE PREVIOUS TRIP
AND WHAT THE RESULTS HAVE BEEN. X X X X

FY 1979 C.C.P. YUGOSLAVIA

ACTIVITY NO. 1 PRIORITY RANK: 1

ANALYZING YUGOSLAV BUSINESS
CONDITIONS FOR U.S. FIRMS

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PRIMARY RESPONSIBILITIES : R. BRUCE MCMULLEN

DESCRIPTION/JUSTIFICATION: THIS ACTIVITY WILL FURNISH
INFORMATION AND ANALYSIS FOR U.S. GOVERNMENT AGENCIES,
AMERICAN BUSINESSES AND THE U.S. BANKING COMMUNITY ON THE STILL
EVOLVING YUGOSLAV ECONOMIC SYSTEM, PARTICULARLY AS IT AFFECTS
FOREIGN FIRMS. YUGOSLAVIA IS PUTTING INTO PLACE A SERIES OF
LAWS AND A SPATE OF REGULATIONS WHICH WILL AFFECT METHODS
OF DOING BUSINESS IN THIS COUNTRY. U.S. FIRMS FACE INDIVIDUALLY
A CONCERTED -- AND FOR THEM CONFUSING -- YUGOSLAV EFFORT TO PUT
A NEW AND FURTHER DECENTRALIZED ECONOMIC SYSTEM INTO EFFECT.
HAVING MINIMAL FOREIGN REPRESENTATION IN YUGOSLAVIA AND FEW
PRIVATE SOURCES OF INFORMATION OUTSIDE YUGOSLAVIA, U.S.
FIRMS RELY ON ECONOMIC/COMMERCIAL PERSONNEL AS THEIR
PRINCIPAL--AND IN SOME CASES THEIR ONLY- SOURCE
OF INFORMATION ON ECONOMIC DEVELOPMENTS. SINCE CURRENT
KNOWLEDGE OF YUGOSLAV BUSINESS CONDITIONS IS ESSENTIAL
TO ALL OUR TRADE PROMOTION ACTIVITIES, THIS EFFORT MUST HAVE
THE FIRST PRIORITY IN THE FY 1979 C.C.P. DURING FY 1978 A
NUMBER OF IMPORTANT LAWS AND REGULATIONS WERE PASSED, THE
WORDING OF MANY OF THESE CHANGES IS UNCLEAR AND A COMPLETE
UNDERSTANDING OF THE WAYS IN WHICH THEY WILL ACTUALLY AFFECT
U.S. INTERESTS CAN ONLY COME FROM THOROUGH REPORTING ON HOW
THEY ARE IMPLEMENTED IN PRACTICE. THERE ARE ALSO A NUMBER OF
REGULATIONS AND LAWS NOT YET PREPARED WHICH SHOULD BE
REPORTED ON AS APPROVED. AREAS REQUIRING PARTICULAR EMPHASIS
ARE FOREIGN TRADE LEGISLATION AND REGULATIONS, AND
IMPLEMENTATION OF NEW FOREIGN INVESTMENT AND BANKING
LEGISLATION.

ACTIONS TO BE TAKEN:

1. THE EMBASSY WITH ASSISTANCE FROM THE CONSULATE GENERAL
AT ZAGREB WILL SUPPLY INFORMATION, ANALYSIS, AND, WHEN NOT
PREVIOUSLY PROVIDED, TRANSLATIONS ON THE FOLLOWING CHANGES

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UNDERWAY IN THE YUGOSLAV ECONOMIC AND FOREIGN RELATIONS SYSTEM:

--LAW ON FOREIGN INVESTMENT IN YUGOSLAVIA

--LAW ON INDUSTRIAL COOPERATION WITH FOREIGN FIRMS AND
TRANSFER OF INDUSTRIAL PROPERTY

--FOREIGN TRADE LEGISLATION AND REGULATIONS

--LEGISLATION ON AWARD OF CONTRACTS TO FOREIGN FIRMS

--REGULATION ON ESTABLISHMENT OF THEIR OWN REPRESENTATION
OFFICES IN YUGOSLAVIA BY FOREIGN BUSINESSES AND BANKS

--LAWS AND REGULATIONS ON THE CUSTOMS REGIME

--REGULATIONS CONCERNING STANDARDS AND TESTING OF IMPORTED
MERCHANDIS

--LEGISLATION AND REGULATIONS ON FOREIGN EXCHANGE AND CREDIT
REGULATIONS

--THE BANKING LAW AND REGULATIONS.

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2. THE EMBASSY WILL PROVIDE IN FIRST QUARTER FY 1979 A DETAILED ASSESSMENT OF THE YUGOSLAV IMPORT REGIME.

3. THE EMBASSY WILL MAKE PERIODIC MAILINGS, USING THE ICA ADDRESSOGRAPH, OF UNCLASSIFIED INFORMATION ON THE ABOVE SUBJECTS TO ABOUT 80 U.S. BUSINESSES AND BANKING OFFICES IN EUROPE.

ACTIVITY NO. 2

PRIORITY RANK: 6

U.S. EXHIBITION AT SEPT. 1979
ZAGREB FALL FAIR

PRIMARY RESPONSIBILITIES: R. BRUCE MCMULLEN/W. POPE

DESCRIPTION/JUSTIFICATION: THE ZAGREB FALL FAIR IS THE OLDEST AND BEST ATTENDED OF YUGOSLAVIA'S MANY TRADE FAIRS. AS SUCH IT IS AN EFFECTIVE VEHICLE FOR U.S. FIRMS TO EITHER ENTER THE YUGOSLAV MARKET OR MAKE THEIR PRESENCE BETTER KNOWN. FOR MANY YEARS THE USG HAS PARTICIPATED IN THE FALL FAIR AND A SUBSTANTIAL USG PRESENCE HAS BECOME TRADITIONAL. AMBASSADOR EAGLEBURGER WISHES TO CONTINUE USG SPONSORED EXHIBITIONS AT THE FAIR BUT WITH AN ECONOMIC/COMMERCIAL FOCUS RATHER THAN THE PREVIOUS UNCLASSIFIED

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"IMAGE SHOW" EMPHASIS. GIVEN THE RELATIVELY GOOD STATE OF BILATERAL POLITICAL RELATIONS AND THE MUTUAL DESIRE FOR EXPANDED ECONOMIC RELATIONS, PARTICIPATION IN A USG EXHIBITION AT THE FALL FAIR OFFERS MANY ADVANTAGES TO U.S. FIRMS. IN BOTH 1977 AND 1978 SUCCESSIVELY LARGER ECONOMIC/COMMERCIALY ORIENTED USG EXHIBITIONS WERE HELD. THE OBJECTIVE OF THIS CAMPAIGN IS TO HAVE AN EVEN LARGER AND MORE EFFECTIVE EXHIBITION AT THE SEPT. 1979 FALL FAIR.

ACTIONS TO BE TAKEN:

THE EMBASSY AND CONGEN ZAGREB WITH ASSISTANCE IN SOME AREAS FROM ICA, USDOC AND THE INTERNATIONAL TRADE CENTER IN MILAN WILL:

1. RECRUIT PARTICIPANTS. USDOC WOULD ESPECIALLY ASSIST IN RECRUITMENT OF FIRMS FOR AN ENERGY SYSTEMS PORTION OF THE EXHIBITION.
2. SECURE EXHIBITION SPACE.
3. HANDLE FINANCIAL, DESIGN AND ADMINISTRATIVE MATTERS.

4. PUBLICIZE THE USG EXHIBITION AND ITS PARTICIPANTS.

5. FOLLOW-UP WITH U.S. PARTICIPANTS REGARDING POST FAIR IMPRESSIONS.

ACTIVITY NO. 3

PRIORITY RANK: 7

U.S. - YUGOSLAV ECONOMIC/COMMERCIAL
WORKING GROUP

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PRIMARY RESPONSIBILITIES: DAVID EVANS

INPUT ON NEWLY CREATED WORKING GROUP AND SPECIFIC COMMENTS
REGARDING POINTS OF REFERENCE WILL FOLLOW SEPTTEL.

ACTIVITY NO. 4

PRIORITY RANK: 8

COMMERCIAL NEWSLETTER

PRIMARY RESPONSIBILITIES : C. HILL

DESCRIPTION/JUSTIFICATION: THE FAVORABLE RESPONSE TO THE
EMBASSY'S COMMERCIAL NEWSLETTER AMONG GOVERNMENT AND BUSINESS
OFFICIALS INDICATES THAT THERE IS GREAT INTEREST IN A
REGULAR PUBLICATION PROVIDING INFORMATION ON NEW U.S. PRODUCTS,
TRADE EVENTS, LICENSING OPPORTUNITIES, AND ECONOMIC AND BUSINESS
TRENDS. THE NUMBER OF INQUIRIES RECEIVED FROM YUGOSLAV
BUSINESSMEN TO DATE ALSO SHOWS THAT ENTERPRISES ARE MAKING
USE OF THE INFORMATION CONTAINED IN THE NEWSLETTER TO MAKE
BUSINESS CONTACTS. FUTURE ISSUES OF THE NEWSLETTER MAY ALSO
BE USED TO EXPLAIN U.S. TRADE POLICY AND PROVIDE INFORMATION
ON NEW TRADE AND CUSTOMS REGULATIONS.

ACTIONS TO BE TAKEN:

1. CONTINUE TO PUBLISH COMMERCIAL NEWSLETTER QUARTERLY WITH
PRINTING AND MAILING ASSISTANCE FROM THE
INTERNATIONAL COMMUNICATIONS AGENCY.
2. INCLUDE INFORMATION ON NEW U.S. PRODUCTS AND TECHNOLOGY
PROPOSALS FOR LICENSING AND JOINT VENTURES, SCHEDULES OF U.S.
TRADE SHOWS AND U.S. GOVERNMENT-SPONSORED EVENTS, THEMATIC
ARTICLES ON U.S. ECONOMIC/BUSINESS TRENDS, U.S./YUGOSLAV
COMMERCIAL NEWS, AND INFORMATION ON U.S. AGRICULTURAL EXPORTS
(TO BE FURNISHED BY AGRICULTURAL ATTACHE). OTHER SPECIAL
FEATURES SHOULD BE ADDED AS APPROPRIATE.

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3. INCREASE MAILING LIST FROM 2,800 TO 3,500 SO THAT SENIOR EXECUTIVES IN SUBDIVISIONS OF MAJOR ENTERPRISES ALSO RECEIVE COPIES.

ACTIVITY NO. 5 PRIORITY RANK: 9

PROMOTION OF FOOD PROCESSING/PACKAGING
EQUIPMENT AND TECHNOLOGY

PRIMARY RESPONSIBILITIES: R.C. MALSZ

DESCRIPTION/JUSTIFICATION: YUGOSLAV ECONOMIC PLANNING CONTINUES TO GIVE HIGH PRIORITY TO AGRO-INDUSTRIAL DEVELOPMENT. IN 1978-80 INVESTMENT IN THIS SECTOR, SUPPORTED IN PART BY IBRD CREDITS, IS EXPECTED TO BE IN THE 2-3 BILLION DOLLAR RANGE. THE MARKET FOR FOOD PROCESSING AND PACKAGING EQUIPMENT, WHICH U.S. FIRMS HAVE ONLY BEGUN TO EXPLOIT, IS UNDERGOING MAJOR EXPANSION AND SHOULD EXPERIENCE ABOVE AVERAGE GROWTH FOR THE NEXT SEVERAL YEARS. WHILE YUGOSLAV IMPORTS OF FPP EQUIPMENT AMOUNTED TO APPROXIMATELY 220 MILLION DOLLARS IN 1977, U.S. FIRMS SUCCEEDED IN SUPPLYING LESS THAN 10 PERCENT OF THIS FIGURE. POST SPECIAL EFFORTS, WHICH WILL INCLUDE SUPPORT FOR A TECHNICAL SALES SEMINAR ON MEAT AND DAIRY PRODUCTS, ARE INTENDED TO FOLLOW-UP ON FY 76 AND FY 77 CAMPAIGN ACTIVITIES AND EXPAND THE U.S. POSITION IN THIS RAPIDLY GROWING MARKET.

ACTIONS TO BE TAKEN:

1. PROMOTE AND SUPPORT USDOC TECHNICAL SALES SEMINAR ON MEAT AND DAIRY PRODUCTS PROCESSING IN OCTOBER 1978.
2. PROMOTE ATTENDANCE AT FOOD AND DAIRY EXPOSITIONS IN ANAHEIM, CALIFORNIA, ON NOVEMBER 5-9, 1978.

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3. MAINTAIN REGULAR CONTACTS WITH AGRO-INDUSTRIAL ENTERPRISES AND APPROPRIATE TRADE ASSOCIATIONS TO OBTAIN EARLY WARNING ON CONSTRUCTION OF NEW FOOD PROCESSING FACILITIES AND PLANT EXPANSIONS.

NOTE BY OC/T: MESSAGE DELAYED IN TRANSMISSION.

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ACTION EUR-12

INFO OCT-01 ISO-00 AID-05 CIAE-00 EB-08 FRB-01 INR-10
NSAE-00 ICA-20 TRSE-00 XMB-04 OPIC-06 SP-02
LAB-04 SIL-01 OMB-01 NSC-05 SS-15 STR-07 CEA-01
INT-05 DOE-15 SOE-02 AGRE-00 IO-14 /139 W
-----040750 241728Z /45

R 211445Z APR 78
FM AMEMBASSY BELGRADE
TO SECSTATE WASHDC 6364
USDOC WASHDC

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ACTIVITY NO. 6 PRIORITY RANK: 10

SUPPORT THE ACTIVITIES OF THE
U.S.- YUGOSLAV ECONOMIC COUNCIL (USYEC)

PRIMARY RESPONSIBILITIES : R.B. MCMULLEN

DESCRIPTION/JUSTIFICATION: THE EMBASSY WILL SUPPORT THE ACTIVITIES OF THE NEW YORK BASED U.S. - YUGOSLAV ECONOMIC COUNCIL AND FACILITATE LIAISON WITH THE BELGRADE BASED COUNTERPART ORGANIZATION, THE YUGOSLAV CHAMBER FOR THE PROMOTION OF ECONOMIC RELATIONS WITH THE UNITED STATES, IN ORDER TO MAXIMIZE THE MULTIPLIER BENEFITS OF THESE ORGANIZATIONS AND TO CONTRIBUTE TO THE GROWTH OF MUTUALLY BENEFICIAL COMMERCIAL ACTIVITIES. EMBASSY SUPPORT OF USYEC ACTIVITIES HELPS SHARPEN EMBASSY UNDERSTANDING OF THE YUGOSLAV SCENE AND STRENGTHENS THE EMBASSY'S CAPABILITIES IN SERVING U.S. INDUSTRY THROUGH USDOC.

THE USYEC ANNUAL MEETING WHICH BRINGS TOGETHER HIGH YUGOSLAV GOVERNMENT OFFICIALS AND REPRESENTATIVES OF 100-130 ENTERPRISES WITH REPRESENTATIVES OF 50-75 U.S. FIRMS IS THE SINGLE MOST IMPORTANT SOURCE OF BUSINESS INFORMATION AND TRADE PROMOTION
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IN OUR PROMOTIONAL PROGRAM. USYEC VIGOROUSLY SUPPORTS
USDOC'S EFFORTS TO ENCOURAGE NEW-TO-MARKET FIRMS TO BECOME

ACTIVE IN YUGOSLAVIA AND ASSISTS THE EMBASSY AND CONGEN
ZAGREB IN PUBLICIZING TRADE AND INVESTMENT OPPORTUNITIES.

ACTIONS TO BE TAKEN:

1. PROVIDE SUPPORT, IF REQUIRED, AND LIAISON BETWEEN THE U.S.
AND YUGOSLAV ORGANIZATIONS FOR THEIR ANNUAL JOINT MEETINGS.
ALSO SUPPORT AD HOC USYEC MEETINGS ON TOPICS OF CURRENT INTEREST.

2. THROUGH REPORTS SUBMITTED TO USDOC AND USYEC KEEP USYEC
MEMBERS ABREAST OF TRADE AND INVESTMENT OPPORTUNITIES.

3. WORK THROUGH THE YUGOSLAV CHAMBER TO TRY TO IMPROVE
YUGOSLAV ENTERPRISES' KNOWLEDGE OF AMERICAN FIRMS AND THEIR
CAPABILITIES, AND HOW THE U.S. MARKET FUNCTIONS.

4. KEEP USYEC UP TO DATE ON PROMOTIONAL EVENTS SPONSORED BY
THE EMBASSY/CONGEN ZAGREB (E.G., ZAGREB FALL FAIR).
THIS SHOULD IMPROVE U.S. PARTICIPATION AND THE EFFECTIVENESS
OF THESE EVENTS.

5. ENCOURAGE THE COUNCIL TO SERVE AS ONE OF THE FORA FOR
U.S. FIRMS TO AIR AND SEEK SOLUTIONS TO BUSINESS PROBLEMS IN
YUGOSLAVIA.

ACTIVITY NO. 7

PRIORITY RANK: 11

FOREIGN BUYER PROGRAM

PRIMARY RESPONSIBILITIES: JELICA KOSTIC

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DESCRIPTION/JUSTIFICATION: IN SUPPORT OF OTHER ACTIVITIES AIMED
AT INCREASING U.S. EXPORT OPPORTUNITIES IN THE MACHINE TOOL AND
MINING EQUIPMENT MARKETS AND IN COMPETING FOR MAJOR INDUSTRIAL
PROJECTS, THE POST WILL PROMOTE FOUR TRADE EVENTS BASED ON
LIMITED SELECTION OF TRADE SHOWS DESIGNATED FOR FBP IN 77
STATE 5757 AND STATE 48966 IN THE UNITED STATES UNDER THE
FOREIGN BUYER PROGRAM. INCREASINGLY YUGOSLAV BUSINESSMEN ARE
WILLING TO CONSIDER TRAVEL TO THE UNITED STATES TO NEGOTIATE
CONTRACTS AND DEVELOP BUSINESS OPPORTUNITIES. IT IS APPROPRIATE,
THEREFORE, THAT GREATER EFFORT BE MADE TO ENCOURAGE ATTENDANCE
AT U.S. TRADE SHOWS WHERE BUSINESSMEN ARE EXPOSED TO A
WIDE RANGE OF EQUIPMENT AND TECHNOLOGY AND HAVE A CHANCE TO
MEET WITH A LARGE NUMBER OF U.S. SUPPLIERS.

ACTIONS TO BE TAKEN:

PROMOTE ATTENDANCE AT FOLLOWING TRADE SHOWS AND, WHERE THERE

IS INTERST, ASSIST IN ORGANIZING GROUP TRAVEL.

1. INTERNATIONAL PUBLIC WORKS CONGRESS, BOSTON,
OCT. 14-19

2. INSTRUMENTATION/AUTOMATION CONFERENCE AND EXHIBITION,
PHILADELPHIA, OCT 15-19

3. WORLD TELECOMMUNICATIONS, DALLAS, FEB 25 - MARCH 2

4. NATIONAL COMPUTER CONFERENCE, NEW YORK, JUNE 4-7.
EAGLEBURGER

NOTE BY OC/T: MESSAGE DELAYED IN TRANSMISSION.

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Message Attributes

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To: STATE COM
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